

# State of Nevada Immunization Registry Training



Powering Nevada's Immunization Registry

Web: <https://webiz.nv.gov> · Email: [izit@health.nv.gov](mailto:izit@health.nv.gov)

Help Desk: (775) 684-5954 · 1-877-NV-WebIZ

# WebIZ System Behavior's

## Remember to:

- Tab between fields or point and click
- Use Menu & Submenu for navigation – **never use the back button.**
- Copy, Cut and Paste data in fields
- Double-click date fields for today's date
- **Mandatory Items are shown in bold print**
- Double-clicking opens screen defaults (bold outline)

## Some helpful Tips & Tricks

**Never** use the back or forward buttons while using WebIZ.

Hit **Enter** to trigger "**The Default**". Default function is bolded

**Calendar Icons**- Clicking on the calendar icons opens up a calendar to select a date.

**Search Criteria** - Search Smart! Reference the guide to best search practices included in this toolkit

**Vaccination History** – Parental Record data may be entered using the "Add History" function (**doses added through "Add History" will not be included in reports**)

**Assume success if nothing "pops up"**

## Icon Identification



**Online Help:** Screen-specific online help can be accessed by clicking on this icon.



**Audit Information:** Hovering over this symbol will reveal the user that created the associated record, the user who last updated the record and the date and time these activities occurred.



**Notes:** Indicates that this patient has additional notes associated with their records. This should be a visual indicator for the user to review these before proceeding. (user or system generated)



**IZ Print Notes:** This indicates that the user has notes that will be printed on the Immunization Record. Again, this may be a visual indicator for the user to review before proceeding. (user or system generated)



**Allergy/Risk:** The patient may have a contraindication to specific vaccinations and this should be examined prior to recommending or administering vaccinations. (user generated)



**Deceased:** This patient is deceased. This may be useful for excluding a patient from being reminded of future vaccination requirements. \*Only WebIZ staff can view a record once it has been marked “Deceased”.



**Deleted:** This patient has been “deleted” from the system. This patient will no longer show up in reports. **Always** make sure the patient you are working with is **not deleted**!! Only users with special privileges have the ability to delete and undelete patients.



**Calendar:** Most date fields in the application are accompanied by a calendar function that will allow the user to click on it and select a date or double-click in the field and set it to today's date.



**Warning:** This icon is a visual indication that something did not or could not occur. For instance, if no results are returned based on input criteria, this symbol along with an explanation would be returned instead.



**Dose Not Administered:** The syringe icon associated with a patient vaccination record means that the Vaccine Added has not yet been “administered” in the application- meaning the process is not complete (only for Types 2 & 3 inventory). **Failure to administer a dose will have adverse effects on inventory and future entries.**



**Invalid Dose:** This icon represents a vaccination that has been marked as invalid. This may be because the vaccination has been given too early or was found to have been expired. (user generated)

## Best Practice for Patient Searches

WebIZ is a wonderful tool to use towards the goal of getting children properly immunized, but there are things all users must do to maintain its integrity. Not searching thoroughly enough often causes users to create duplicate records- and may lead to duplicate vaccinations!

### 1. General Requirements/Tips

- As a general rule, it is *recommended* that users search using a combination of 2 fields.
- If searching using a name, users must enter data in at least 2 name fields
- Users may search using *only* the date of birth (MM/DD/YYYY)
- Above all, **Search Smart!!** Any user who's searched for a patient in WebIZ has probably figured out there are a *lot* of Smith's, Hernandez's and Johnson's in this world!

**\*\*Example:** A user would definitely *not* want to search for last name "Smith", first name "A"; in this case, the user should elaborate on the first name. If the user knows the patient's name to be Ann, Anne or Angela, typing in "An" for the first name would narrow down the search- but not by much!! Remember- **search smart!**

### 2. Searching with a Name

Users may search for a patient using the patient's name. When searching with a name (or part of a name), users must enter data in at least two (2) fields (i.e. users may not search using *just* a last or *just* a first).

**\*\*Example:** Last name & DOB, first name & DOB, last name & first name

WebIZ performs a "wildcard" search using the information entered. This means that it looks for *everything* that matches or begins with the letters entered. The system will also display those with matching Alias Names (found in the Demographic screen).

**\*\*Example:** Entering "Johns" as a last name and "A" as the first name will display all patients with a last name of Johnston or Johnson, etc. *and* a first name that begins with the letter "A".

The wildcard feature is particularly helpful- any user could hit the wrong key, and many users have experienced a patient changing the spelling of their or their child's name. By entering only part of a name, users can account for these situations.

**\*\*Example:** "Johnson" may have accidentally been entered as "Johnnson" (see the extra "n"?); "Rachel" may have become "Rachael"

**In each of these situations, a user would *not* have found the patient record if the full name provided was used in the search.**

### 3. Searching with the WebIZ Patient #

When vaccinating a returning patient, a user may have the WebIZ Patient # documented in the patient's medical chart. In this case, the user would first search for the patient using just the Patient #. This is a unique identifier that should assist in easily finding the patient's record. If the user has searched using the number and still cannot find the record, they would then want to try a combination of the name or name and date of birth. Remember- if all users **search smart**, the database will be a better place!

# WebIZ Quick Start Guide

## STEP 1

To access WebIZ type in the following URL: <https://webiz.nv.gov>. Then log into WebIZ using your unique Username and Password. First time users automatically will have to establish a password unique to them. Home Screen appears - **Note** any Announcements etc. Also ensure you have selected your provider. Remember if you have access to more than one clinic then select the clinic in which you are entering the data.

## STEP 2

**PATIENTS** - Select patients from the Green Main Menu box

- Default to Search
- Type in a combination of First Name, Last Name and Date of Birth (Note: Must fill in two fields)
- Your patient is not there? Try again with a different combination. If your patient is still not there: Select: Create new Patient
  - Fill in Date of Birth and Gender.
  - Select *Create!* When you select create the systems defaults to the demographic screen.

## STEP 3

**PATIENT DEMOGRAPHICS Screen** is the default screen that appears when you select *create from add patient screen*.

Make sure the bolded Fields are filled out. The required (**bolded**) fields are:

**Last Name, First Name, DOB, Gender, VFC Eligibility and Address.** (Note: in the Address field the system wants you to create a Street Address and or P.O. Box, City, County, State and Zip Code.) To save time select Copy Above to fill in the physical address information if it is the same as the mailing address.

## STEP 4

**EVENTS** - Documents specific occurrences for your patient. - **OPTIONAL**

## STEP 5

**RELATIONSHIP**- Links records together. Siblings, parent to child etc. It is important that you relate your primary records to it self; then when linking other sibling/parent records ensure that records have already been created. Use with caution! - **OPTIONAL**

## STEP 6

**PROGRAMS**: This is an automatic feature that is filled in once you document your first immunization. However, when you want to disassociate the patient with your clinic then you would close the record. Select a close date and reason.

## STEP 7

**NOTES**: This feature is used to document anything specific that you want to note regarding a patient and their immunizations. Be careful to guard the privacy of your patient. - **OPTIONAL**

When a shot is refused and you have selected that in the vaccination screen a note will be created.

## STEP 8

**ALLERGY & RISKS:** Select this feature if you want to note an allergy for your patient. When selecting the allergy the system will generate a list of vaccines that ***SHOULD NOT*** be given to your patient. *Only used if there is an allergy.*

## STEP 9

**VACCINATIONS** - Select this feature to document vaccinations for your patient.

- **Quick Add** *is considered Level 1 inventory.*
  - Select your patient,
  - Select Vaccinations,
  - Select Quick Add
    - Document Administer by (select who actually gave the shot),
    - Vac (vaccination) date,
    - Select vaccine from the drop down box,
    - Select administration site.
    - Select **Done**.
- **Add Vaccinations** *is considered Level 2 inventory* which documents manufacturer and lot#'s.
  - Prior to documenting vaccinations for your patients you must document manufacturer and lot #'s in the system.
    - To begin go to the green main menu box and select Settings.
    - Select Edit Clinic vaccine mfg/lot defaults.
    - Select the vaccine and manufacturer of the vaccine.
      - The dosage and route are automatically filled in based on the vaccine selected.
      - You must fill in the **LOT #, EXPIRATION DATE, and FUNDING SOURCE.**
      - Select **update** when done.
  - Then to document a vaccine: Select your patient and then select vaccinations.
    - Select Add Vaccination.
    - Select the vaccine that was given to your patient from the drop down box.
    - Select Save and Administer
      - You will automatically be brought to the default screen of your vaccinations which lists the Vaccine you added as well as the manufacturer, lot number, funding source, route and dosage.
      - You must fill in the site (I.e. where on the body the shot was given)
      - Also make sure the administer by field is filled out with the shot giver.
    - Select **Done**.

### • **Add History**

- Select Add History when you want to document shots that occurred prior to your clinic utilizing WebIZ. You would use Add History to document your patients immunization history whether it occurred at another provider or if you had not previously been documenting in WebIZ.
- Select Add History
- You will either have a screen that has date boxes at the top of the page and then check boxes below or date boxes going across the screen where you put the information.
- Upon entering the information you would select add at the top or bottom of the screen to save the information you have recorded. The default location of this historical information is the Parent Record.
- When you return to the Vaccination screen you will see the immunization information and only difference you will see is under Clinic name the initials PR will be there versus the name of your clinic.

### **Immunization Record: Where do you find it?**

The immunization record can be accessed in several different ways.

1. After searching for your patient you are at the patient home screen. At the bottom of that screen is a hyperlink directly to the immunization record.
2. After search for your patient you can then selection vaccinations. To the right of the green menu box you will see a hyper link that will take you directly to the immunization record.
3. In the green menu box you can access the immunization record by selecting Reports/Forms. The top choice is the immunization record. Please note that when selecting the immunization record from this place the system does not know which patient you are requesting and will default to the search screen which you will then need to complete steps one and/or step two.